Learn2Earn LABS

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Digital Notes

Module 9:

Marketing Automation

Learn how to automate marketing processes, nurture leads, and deliver the right message at the right time.

Save Time & Effort
Automate repetitive marketing tasks

Nurture Leads
Build relationships and move leads forward

Improve Conversions
Deliver personalized experiences

Increase ROI
Get more results with less manual work

What You'll Learn

Email Marketing Automation
Build automated email workflows and campaigns

Workflow & Drip Campaigns
Create multi-step journeys to nurture leads

Lead Management
Capture, score, segment, and manage leads effectively

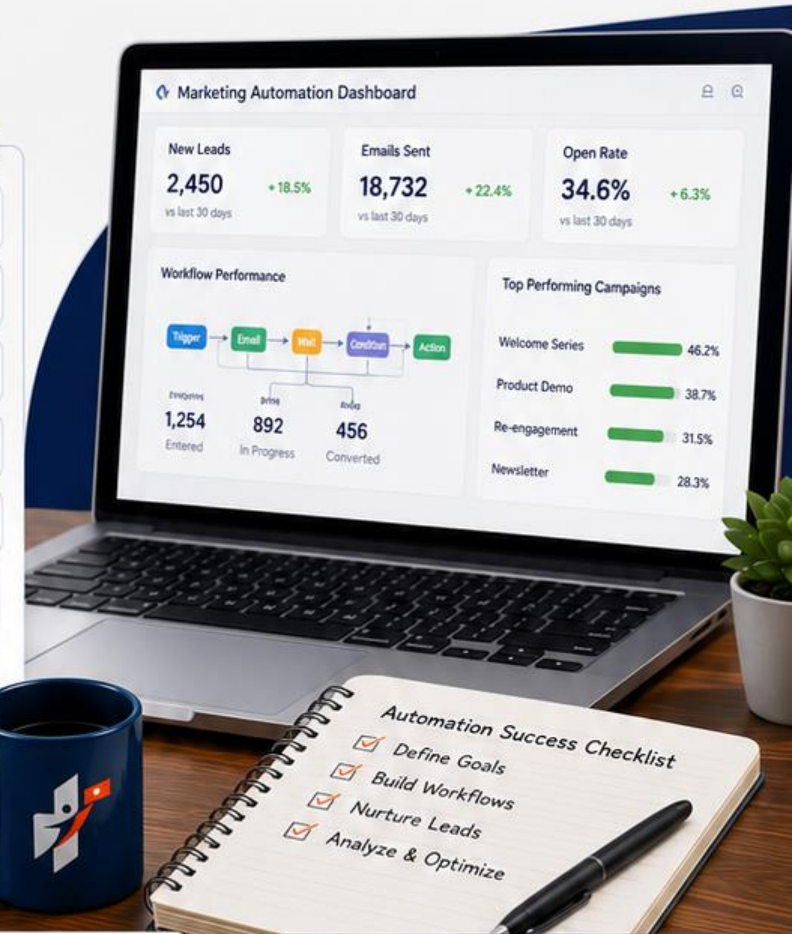
CRM Integration
Connect tools and sync data seamlessly

Analytics & Optimization
Track performance and optimize for better results

Tools & Best Practices
Explore leading tools and industry best practices

Core Areas Covered

- Marketing Automation Fundamentals
- Email Automation & Sequences
- Landing Page & Form Automation
- Behavior-Based Triggers
- Lead Scoring & Segmentation
- Integration with CRM & Other Tools
- Reporting & Performance Tracking
- Automation Tools Overview



Tools You'll Work With

Mailchimp | HubSpot | ActiveCampaign | ConvertKit | Zapier | and more...

Who Should Learn?

- Digital Marketers
- Business Owners
- Freelancers
- Students & Career Seekers

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Module 9

Marketing Automation

Module Overview

Marketing automation means using software to perform repetitive marketing activities automatically according to predefined rules.

For example, when a visitor completes an enquiry form, the system can:

1. Save the visitor's information.
2. send a welcome email.
3. notify the sales team.
4. create a follow-up task.
5. send educational content after two days.
6. stop the sequence when the visitor purchases.

Marketing automation does not require students to become programmers. Modern automation platforms use visual editors, forms, templates, conditions and drag-and-drop workflows.

This module teaches non-technical learners how to plan, build, test and improve practical marketing automations for e-commerce websites, service businesses, educational institutes and local stores.

Features, prices and free-plan limits change regularly. Always verify the current plan before using a tool for a real business.

Learning Objectives

After completing this module, learners should be able to:

- Understand how marketing automation works.
- Identify repetitive marketing activities that can be automated.
- Explain triggers, actions, conditions and delays.
- Map a customer journey before building an automation.
- Collect leads using online forms.
- Organise leads using lists, tags and custom fields.
- Create a simple customer database.

- Build a welcome email automation.
- Create lead-nurturing sequences.
- Design automations for e-commerce, services and local businesses.
- Set up basic no-code connections between marketing applications.
- Create sales follow-up reminders.
- use automation without sending spam.
- Test workflows before activating them.
- Troubleshoot common automation problems.
- Measure automation performance.
- Protect customer data and consent.
- Decide when a process should remain manual.

Table of Contents

1. Understanding Marketing Automation

1.1 What Is Marketing Automation?

Marketing automation is the use of software to deliver a message or perform an action automatically when a predefined event occurs.

A simple automation follows this pattern:

When this happens → Check these conditions → Perform this action

Example:

When someone downloads an e-book
→ Check that email permission was provided
→ Send the download email
→ Wait two days
→ Send a related educational email

The learner decides:

- What starts the automation
- Who should enter it
- What should happen
- When it should happen
- When it should stop
- How success will be measured

1.2 Marketing Automation Is Not Only Email

Automation can be used for:

- Lead capture
- Email marketing
- Customer segmentation
- Sales follow-up
- Appointment reminders
- E-commerce communication
- Customer onboarding
- Review requests
- Social media scheduling
- Lead assignment

- CRM updates
- Internal notifications
- Reporting
- Customer retention
- Re-engagement campaigns

1.3 Automation vs Bulk Marketing

Bulk marketing	Marketing automation
Same message sent to a large audience	Message triggered by behaviour or customer data
Sent at a scheduled campaign time	Sent when an individual reaches a step
Limited personalisation	Can use customer details, interests and actions
Useful for announcements	Useful for customer journeys
Usually, one campaign	Can contain several connected steps

Example:

- Sending a festival offer to the full customer list is a bulk campaign.
- Sending a welcome email immediately after an individual subscribes is automation.

1.4 Automation vs Artificial Intelligence

Marketing automation	Artificial intelligence
Follows predefined rules	Generates, predicts or classifies information
Performs actions	Assists with decisions and content
Usually, predictable	Output may vary
Example: send an email after form submission	Example: draft the email copy

AI can help create an automation plan, but automation software executes the plan.

2. Benefits of Marketing Automation

2.1 Faster Response

A prospect can receive useful information immediately after submitting an enquiry.

2.2 Consistent Communication

Every lead receives the approved message instead of depending entirely on manual follow-up.

2.3 Reduced Repetitive Work

Staff do not need to repeatedly:

- Copy form data
- Send the same welcome email
- Create reminder tasks
- Inform team members
- Update multiple spreadsheets

2.4 Better Lead Nurturing

A person who is not ready to purchase can receive educational content over time.

2.5 Improved Personalisation

Messages can be based on:

- Product interest
- Location
- Lead source
- Customer type
- Purchase history
- Course interest
- Engagement
- Funnel stage

2.6 Better Measurement

Automation platforms can show:

- How many contacts entered
- How many received the message
- How many opened or clicked
- How many completed the desired action
- Where contacts stopped progressing

2.7 Important Limitation

Automation cannot correct a weak strategy.

If the business has:

- A poor offer
- Incorrect customer data
- Unclear messaging
- No customer consent
- A weak website
- Slow sales follow-up

automation may simply repeat the problem more quickly.

3. Basic Marketing Automation Terms

3.1 Trigger

A trigger is the event that starts an automation.

Examples:

- A form is submitted.
- A contact joins a list.
- A tag is added.
- A product is purchased.
- A cart is abandoned.
- An appointment is booked.
- A specific date arrives.
- An email link is clicked.

3.2 Action

An action is what the system performs.

Examples:

- Send an email.
- Add a tag.
- update a contact field.
- Create a sales task.
- Notify a staff member.
- Add the contact to a list.
- Remove the contact from a list.
- Send data to another application.

3.3 Condition

A condition checks whether something is true.

Example:

Has the contact purchased the course?

The automation can create two paths:

Yes → Stop promotional emails and begin onboarding
No → Continue the nurturing sequence

3.4 Delay or Wait Step

A delay pauses the automation.

Examples:

- Wait 10 minutes.
- Wait two days.
- Wait until Monday at 10:00 a.m.
- Wait until the customer's appointment date.

3.5 Workflow

A workflow is the complete sequence of triggers, conditions, delays and actions.

3.6 Contact

A contact is an individual stored in the marketing or CRM system.

A contact record may contain:

- Name
- Email address
- Phone number
- Location
- Interest
- Lead source
- Consent status
- Last interaction
- Customer stage
- Purchase history

3.7 List

A list is a collection of contacts.

Examples:

- Newsletter subscribers
- Digital marketing course leads
- Existing customers
- Chandigarh store customers
- Webinar registrations

3.8 Tag

A tag is a label added to a contact.

Examples:

Interest-SEO
Source-Facebook
Downloaded-Ebook
Attended-Webinar
Customer-Active
Followup-Urgent

3.9 Custom Field or Contact Attribute

A custom field stores a specific piece of information.

Examples:

- Preferred course
- Business category
- Budget range
- Appointment date
- Product purchased
- Lead source
- Sales counsellor

3.10 Segment

A segment is a group created using conditions.

Example:

Location = Chandigarh
AND
Interest = Digital Marketing
AND
Customer Status = Not Purchased

Unlike a basic list, a dynamic segment can change automatically when contact information changes.

3.11 CRM

CRM stands for Customer Relationship Management. A CRM stores and manages information about leads, customers, deals and interactions.

3.12 Webhook

A webhook sends information from one application to another when an event occurs.

Non-technical learners do not need to write webhook code for basic exercises. No-code platforms can often manage the connection.

3.13 API

An API allows applications to exchange information. It works like a controlled connection between software systems.

API-based custom development normally requires technical assistance. Beginners should first use built-in integrations or no-code connectors.

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4. Understanding a Marketing Automation Workflow

A workflow can be visualised as a flowchart.

```
                Form submitted
                      ↓
            Permission available?
                   ↙     ↘
                 No        Yes
                 ↓          ↓
         Store only   Add to lead list
                      ↓
             Send welcome email
                      ↓
                Wait 2 days
                      ↓
           Did the lead purchase?
                   ↙     ↘
                 Yes       No
                  ↓         ↓
      Start onboarding   Send case study
```

4.1 The T-C-A-D-E Framework

Use the T-C-A-D-E framework to plan an automation.

T — Trigger

What starts the workflow?

C — Conditions

Who should enter, and what rules should be checked?

A — Actions

What should the system do?

D — Delays

How much time should pass between actions?

E — Exit

When should the contact leave the workflow?

4.2 Example

Trigger:
A person submits the course-enquiry form.

Conditions:
The person selected Digital Marketing and agreed to receive updates.

Actions:
Add the contact to the Digital Marketing Leads list.
Send the course-information email.
Notify the counsellor.

Delay:
Wait one day.

Next action:
Send a practical-learning video.

Exit:
Remove the person when the course is purchased or consent is withdrawn.

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5. Selecting Activities to Automate

Automation is most useful for work that is:

- Repetitive
- Rule based
- Frequent
- Time sensitive
- Easy to measure
- Low risk
- Consistent

5.1 Automation Opportunity Audit

Create a table like this:

Activity	Frequency	Current time	Rule based?	Risk	Automation priority
Welcome email	Daily	10 min	Yes	Low	High
Reply to complaint	Weekly	20 min	No	High	Low
Sales reminder	Daily	5 min	Yes	Medium	High
Strategic proposal	Monthly	3 hours	No	High	Low

5.2 Activities That Should Usually Remain Human Controlled

- Handling serious complaints
- Negotiating important contracts
- Approving refunds
- Responding to legal notices
- Making employment decisions
- Giving medical, legal or financial advice
- Publishing sensitive statements
- Managing unusual customer situations
- Sending high-value customised proposals

Automation can notify a responsible employee about these situations, but it should not independently make the final decision.

6. Free and Beginner-Friendly Tools

6.1 Google Forms and Google Sheets

Google Forms can collect lead information, while Google Sheets can store responses. Google officially allows form responses to be saved in a linked spreadsheet. Google Forms help

Practical uses:

- Course enquiry form
- Webinar registration
- Customer survey
- Consultation request
- Event registration
- Feedback collection

This combination is easy for beginners, but advanced automatic email sequences normally require an additional tool or script.

6.2 Brevo

Brevo provides email campaigns, contact management, forms, sales features and visual automation.

Its current free plan includes:

- Up to 300 email sends per day
- Storage for up to 100,000 contacts
- Automation entry for up to 2,000 unique contacts
- One account user
- Basic statistics
- A limit of 50 open deals

Check the latest limits before starting a real campaign because plans can change. Brevo Free-plan limits

Brevo is suitable for the practical exercises in this module because it provides a visual automation editor.

6.3 Mailchimp

Mailchimp provides forms, contact management, email campaigns and automation flows. However, feature availability depends on the selected plan. Its current free marketing plan has a relatively small contact limit, and some advanced automation capabilities require a paid plan.

Mailchimp's official instructions describe how to select an audience, choose a trigger, add actions or rules, test the flow and activate it. Mailchimp automation-flow guide

6.4 Zapier

Zapier connects different applications without requiring programming.

Example:

Trigger: New Google Forms response
Action: Create a contact in another application

Zapier's current free plan includes 100 tasks per month and two-step workflows consisting of one trigger and one action. A polling-based trigger may take up to 15 minutes to detect new information. Zapier Free-plan details

6.5 Other Tools Learners May Explore

- HubSpot CRM
- Zoho CRM
- Make
- Pabbly Connect
- MailerLite
- Calendly
- Tally
- WordPress form plugins
- Shopify automation applications
- WooCommerce integrations

Always compare:

- Free-plan limits
- Number of contacts
- Monthly sends
- Available integrations
- Automation steps

- Reporting
- Support
- Data-export options
- Privacy requirements
- Upgrade cost

---

7. Practical Exercise: Create a Lead-Capture System

This is the first automation foundation. The objective is to collect clean, useful and permission-based lead information.

7.1 Plan the Form

Suppose an educational institute wants to collect course enquiries.

Recommended fields:

- Full name
- Email address
- Mobile number
- City
- Course interest
- Current education or occupation
- Preferred contact time
- Message
- Marketing consent

Avoid requesting information that is not necessary.

7.2 Create the Form in Google Forms

1. Sign in to a Google account.
2. Open Google Forms.
3. Select **Blank Form**.
4. Enter the title: Course Enquiry Form.
5. Add a short description explaining how the information will be used.
6. Add the required questions.
7. Mark essential questions as **Required**.
8. Add a consent checkbox.
9. Open **Settings**.
10. Review response collection settings.

11. Preview the form.
12. Submit a test response.

7.3 Example Consent Statement

I agree to receive information about the selected course by email or phone.
I understand that I can withdraw my consent.

This is an example for classroom practice, not legal advice. The business must use wording suitable for its region and communication channel.

7.4 Connect the Form to Google Sheets

1. Open the form.
2. Select the **Responses** tab.
3. Click the Google Sheets icon.
4. Choose **Create a new spreadsheet**.
5. Enter a suitable spreadsheet name.
6. Click **Create**.
7. Submit another test response.
8. Confirm that the response appears in the sheet.

7.5 Add Lead-Management Columns

Add these columns after the form-response columns:

- Lead ID
- Lead status
- Assigned to
- Last contacted
- Next follow-up
- Lead source
- Notes
- Consent status
- Converted
- Conversion date

7.6 Suggested Lead Statuses

Use consistent values:

New
Contacted
Qualified

Appointment Booked
Proposal Sent
Converted
Not Interested
Invalid
Follow Up Later

Use data validation in Google Sheets to create a dropdown. This prevents team members from entering different versions such as New Lead, new, and NEW.

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8. Designing a Clean Contact Database

Poor data creates poor automation.

8.1 One Person, One Contact Record

Do not store the same contact repeatedly if the system supports updating an existing record.

A duplicate contact may receive:

- The same email twice
- Conflicting offers
- Repeated sales calls
- An incorrect customer journey

8.2 Use Standard Formatting

Names

Use:
Riya Sharma

Avoid:
RIYA SHARMA!!!

Phone numbers

Choose one consistent format that includes the appropriate country code.

Dates

Use an unambiguous format such as:

2026-07-16

Lead sources

Use standard values:

Google Ads
Meta Ads
Organic Search
Instagram
Referral
Walk-in
Webinar

Do not allow employees to create random versions such as FB, Facebook lead, Meta, and Facebook Ads.

8.3 Essential Contact Fields

Field	Purpose
Email	Email communication and contact matching
Phone	Calling or approved messaging
Lead source	Attribution
Interest	Segmentation
Status	Sales progress
Consent	Communication permission
Last activity	Follow-up
Owner	Responsibility
Customer status	Automation entry and exit

8.4 Tag-Naming Rules

Use a standard pattern:

Category-Value

Examples:

Interest-SEO
Interest-MetaAds
Source-Webinar
Source-GoogleAds
Stage-NewLead
Stage-Customer
Action-DownloadedGuide

Document the naming system so that the team does not create several tags for the same meaning.

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9. Creating a Brevo Account for Practice

9.1 Initial Setup

1. Visit the official Brevo website.
2. Create an account.
3. Verify the email address.
4. Complete the business profile.
5. Add the business name and address accurately.
6. Configure the sender name.
7. Add a business email address.
8. Authenticate the sending domain if the platform requests it.
9. Add only permission-based contacts.
10. Review current plan limitations.

Avoid using false business information because sender verification and email trust depend on accurate details.

9.2 Create Contact Attributes

In the contacts area, create fields such as:

COURSE_INTEREST
CITY
LEAD_SOURCE
LEAD_STATUS

CONSENT_STATUS
APPOINTMENT_DATE

9.3 Create Lists

Example lists:

New Course Leads
Digital Marketing Leads
Webinar Registrations
Existing Students
Unqualified Leads

Lists should have a clear business purpose.

9.4 Importing Contacts

Before importing:

- Remove duplicate email addresses.
- Delete contacts without permission.
- Correct spelling mistakes.
- Standardise city and source names.
- Confirm field headings.
- Save the file as CSV if required.
- Keep an original backup.
- Map every column carefully.

Never purchase an email database and upload it for marketing.

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10. Practical Workflow 1: Welcome Email Automation

10.1 Business Situation

A visitor subscribes to receive a free beginner's digital marketing checklist.

10.2 Workflow Plan

Trigger:
Contact added to “Checklist Subscribers”

Action:
Send checklist delivery email

Delay:
Wait 2 days

Action:
Send practical learning email

Delay:
Wait 3 days

Condition:
Has the contact enrolled?

Yes:
Exit promotion and start onboarding

No:
Send course information

10.3 Create the Automation in Brevo

The current Brevo process is based on a visual workflow editor. Its official beginner instructions begin with **Automations → Workflows → Create an automation**, after which the user chooses a template or builds a custom workflow. Brevo automation guide

Practical steps:

1. Open **Automations**.
2. Select **Workflows**.
3. Click **Create an automation**.
4. Choose the welcome automation template if available.
5. Name it clearly:

Welcome – Digital Marketing Checklist – Version 1

6. Select a trigger such as **Contact added to a list**.

7. Select the Checklist Subscribers list.
8. Add the **Send an email** action.
9. Select or create the delivery email.
10. Add a waiting period.
11. Add the next educational email.
12. Add an exit condition where available.
13. Save the workflow.
14. Test it with your own email address.
15. Activate it only after successful testing.

10.4 Welcome Email Example

Subject: Your Digital Marketing Checklist Is Ready

Hello {{first_name}},

Thank you for requesting our Digital Marketing Beginner Checklist.

You can access it here:
[Checklist Link]

Start with the first three tasks:
1. Define one target audience.
2. Select one measurable marketing objective.
3. Review your current online presence.

Over the next few days, we will send you practical resources to help you understand digital marketing.

Regards,
Team ABC

10.5 Important Checks

- Does the download link work?
- Does the first-name field display correctly?
- What happens if the first name is missing?
- Is the sender name recognisable?
- Is the reply address monitored?
- Does the email display correctly on mobile?
- Is an unsubscribe option available?
- Does the contact exit after purchasing?

11. Practical Workflow 2: Lead-Nurturing Automation

Lead nurturing means educating and building trust with prospects who are not yet ready to purchase.

11.1 Example Sequence for a Training Institute

Email 1: Immediate

Purpose: Confirm the enquiry and provide course information.

Email 2: After one day

Purpose: Explain what students will learn practically.

Email 3: After three days

Purpose: Show an authentic student project or classroom demonstration.

Email 4: After five days

Purpose: Answer common questions.

Email 5: After seven days

Purpose: Invite the lead to book a counselling session.

11.2 Workflow

Form submitted
↓
Add tag: Interest-DigitalMarketing
↓
Send course overview
↓
Wait 1 day
↓
Send practical curriculum email
↓
Wait 2 days
↓
Did lead book counselling?
↙ ↘
Yes | No
↓ | ↓
Send appointment info | Send student project
↓ | ↓
Exit nurture | Wait 2 days
↓
Send FAQ email

11.3 Nurturing Principles

Every message should have one primary purpose.

Do not send:

- The same sales pitch repeatedly
- False urgency
- Unverified placement claims
- Guaranteed income claims
- Messages at an unreasonable frequency
- Content unrelated to the lead's interest

11.4 When to Stop the Sequence

Exit the contact when:

- The person purchases.
- The person unsubscribes.
- The email repeatedly bounces.
- The contact is marked invalid.
- A staff member begins a sensitive one-to-one conversation.
- The person requests no further communication.

---

12. Practical Workflow 3: Service-Based Business

12.1 Example Business

A digital marketing agency collects requests for a free website audit.

12.2 Automation Plan

Audit form submitted
↓
Send confirmation email
↓
Create CRM deal
↓
Assign lead to consultant
↓
Notify consultant
↓
Wait 1 business day
↓
Was the lead contacted?
↙ ↘
Yes No
↓ ↓
Continue deal Send internal reminder

12.3 Required Form Fields

- Full name
- Business email
- Website

- Business category
- Main marketing challenge
- Approximate monthly marketing range
- Preferred contact time
- Consent

Avoid asking for website passwords or administrative access through a general enquiry form.

12.4 Lead Qualification

A simple qualification system can use:

Criterion	Example score
Website provided	10
Service matches agency capability	20
Decision required within 30 days	20
Consultation booked	30
Valid business email	10
Complete brief	10

The score should prioritise follow-up, not unfairly reject people.

12.5 Human Involvement

Automation may create and assign the lead, but a human should:

- Review the business
- Understand the problem
- Conduct the consultation
- Approve the proposal
- Negotiate scope and price

13. Practical Workflow 4: E-Commerce Automation

13.1 Common E-Commerce Automations

- New subscriber welcome
- First-purchase offer
- Abandoned cart
- Order confirmation
- Shipping notification
- Product education
- Review request
- Replenishment reminder
- Cross-sell
- Customer re-engagement
- Back-in-stock notification

13.2 Abandoned-Cart Workflow

```
Product added to cart
↓
Checkout not completed
↓
Wait 1 hour
↓
Purchase completed?
↙        ↘
Yes       No
↓         ↓
Exit      Send cart reminder
          ↓
          Wait 24 hours
          ↓
          Purchase completed?
          ↙        ↘
          Yes       No
          ↓         ↓
          Exit      Send helpful FAQ
```

13.3 Abandoned-Cart Email

Subject: Did You Leave Something Behind?

Hello {{first_name}},

The items you selected are still in your cart.

You can continue your order here:
[Return to Cart]

If you have questions about size, delivery or returns, reply to this email.
We will be happy to help.

Regards,
Team ABC

Do not state that an item is almost sold out unless actual inventory information supports the claim.

13.4 Post-Purchase Workflow

Order completed
↓
Send confirmation
↓
Wait until estimated delivery
↓
Send product-use guidance
↓
Wait 7 days
↓
Request an honest review
↓
If positive engagement
↓
Send relevant cross-sell later

13.5 Transactional vs Promotional Messages

Transactional messages provide information necessary for an existing transaction.

Examples:

- Order confirmation
- Password reset
- Payment receipt
- Shipping update

Promotional messages encourage an additional purchase.

Examples:

- Discount offer
- Product recommendation
- New collection announcement

Do not assume that permission for a necessary order update automatically provides permission for unlimited promotional messaging.

---

14. Practical Workflow 5: Local Store

14.1 Example Business

A local bakery collects birthday information and customer permission.

14.2 Workflow

Customer joins birthday club
↓
Store name, email and birthday month
↓
Send welcome message
↓
Wait until seven days before birthday
↓
Send birthday offer
↓
Offer redeemed?
↙ ↘
Yes No
↓ ↓
Thank customer Send one reminder

14.3 Other Local-Store Ideas

- Appointment reminders
- Service-due reminders
- Festival campaigns
- Feedback requests
- Event invitations
- Loyalty rewards
- Reorder reminders
- Inactive-customer campaigns

14.4 Avoid Excessive Messaging

A local business should not automatically send messages through every available channel. The customer should understand:

- What type of communication will be sent
- Through which channel
- How frequently it may be sent
- How to stop it

15. Practical Workflow 6: Webinar Automation

15.1 Workflow Plan

Webinar form submitted
↓
Send registration confirmation
↓
Add calendar information
↓
Wait until 24 hours before webinar
↓
Send reminder
↓
Wait until 1 hour before webinar
↓
Send joining link
↓
Webinar completed
↓
Attended?
↙ ↘
Yes No
↓ ↓
Send slides and offer | Send recording and next session

15.2 Information to Prepare

- Webinar title
- Date and time
- Time zone
- Speaker
- Joining link
- Calendar link
- Reminder schedule
- Recording link
- Follow-up offer
- Attendance information

15.3 Common Error

Always mention the time zone. A message stating only "5:00 p.m." may confuse participants in other locations.

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16. Connecting Applications Without Coding

No-code connectors allow one application to send information to another.

16.1 Understanding a Two-Step Connection

Trigger application → Action application

Example:

Google Forms response → Create spreadsheet row

or:

Facebook lead received → Create CRM contact

16.2 Practical Zapier Exercise

Objective

When a new form response appears, create a record in a second application.

Steps

1. Create accounts in both applications.
2. Submit a test record in the trigger application.
3. Sign in to Zapier.
4. Click **Create** and select **Zap**.
5. Select the trigger application.
6. Choose the trigger event.
7. Connect the application account.
8. Test the trigger.
9. Check that Zapier finds the correct test record.
10. Select the action application.

11. Choose the action event.
12. Connect the second account.
13. Match or map each field.
14. Test the action.
15. Confirm that the record was created correctly.
16. Name the automation.
17. Turn it on.
18. Monitor the first real entries.

16.3 Understanding Field Mapping

Suppose the form contains:

Full Name
Email
City
Course

Map them as follows:

Form field	CRM field
Full Name	Contact Name
Email	Email Address
City	City
Course	Interest

Incorrect mapping may place the city in the email field or overwrite an existing record.

16.4 Understand Task Usage

If one successful action counts as one task, then:

100 form submissions × 1 action = 100 tasks

A free plan may stop processing new records after the task allowance is reached. Monitor usage and design only necessary actions.

17. CRM Pipeline Automation

A CRM pipeline shows the stages through which a lead or deal moves.

17.1 Sample Service Pipeline

New Enquiry
Qualified
Meeting Scheduled
Meeting Completed
Proposal Sent
Negotiation
Won
Lost

17.2 Sample Educational Pipeline

New Lead
Counselling Pending
Counselling Completed
Demo Attended
Application Started
Fee Pending
Enrolled
Not Interested

17.3 Automation Ideas

When a new lead is created

- Assign an owner.
- Create a follow-up task.
- Send a confirmation email.

When a meeting is booked

- Update the deal stage.
- Send a reminder.
- Notify the counsellor.

When a deal is won

- Stop lead-nurturing emails.
- Add the customer tag.
- Start onboarding.

When a deal is lost

- Record the reason.
- Stop active sales follow-ups.
- Add the contact to a suitable long-term segment only if permission exists.

17.4 Pipeline Rule

A contact's lifecycle and a deal's stage are related but not identical.

One contact may:

- Enquire about two services
- Have more than one deal
- Be an existing customer and a new prospect at the same time

Design the database carefully before automating stage changes.

---

18. Lead Scoring

Lead scoring assigns points to contact characteristics or actions.

18.1 Behavioural Scoring

Action	Score
Opens an email	+1
Clicks a service link	+5
Downloads a guide	+5
Visits pricing page	+10
Books a consultation	+25
Purchases	+50
No activity for 60 days	-10
Invalid contact details	-25

18.2 Profile Scoring

Characteristic	Score
Location is serviceable	+10
Requested service is available	+15
Decision timeframe below 30 days	+10
Information is incomplete	-5

18.3 Example Rule

If lead score reaches 30
→ Add tag: Sales-Ready
→ Notify salesperson
→ Create follow-up task

18.4 Lead-Scoring Limitations

Email opens are not always reliable indicators. Privacy features and automated security systems can affect tracking.

Do not use lead score as the only basis for important decisions. It should help prioritise human attention.

---

19. Segmentation and Personalisation

19.1 Useful Segments

- New subscribers
- Active prospects
- Existing customers
- Customers by product
- Customers by location
- Unengaged contacts
- Webinar attendees
- Leads from a particular campaign
- Customers due for renewal

19.2 Personalisation Fields

Example:

Hello {{first_name}},

Personalisation can also use:

- Product name
- Appointment date
- Location
- Course interest
- Account manager
- Last purchase

19.3 Fallback Text

If the first name is missing, the message should not display:

Hello {{first_name}},

Configure fallback text such as:

Hello there,

19.4 Avoid Uncomfortable Personalisation

Do not reveal that the business is tracking every action.

Poor example:

We saw that you visited our price page three times last night.

Better example:

If you are comparing plans, this guide may help you select the right option.

---

20. WhatsApp and SMS Automation

WhatsApp and SMS can generate quick responses but require careful consent and frequency control.

20.1 Suitable Uses

- Appointment confirmation
- Event reminder
- Order update
- Payment reminder
- Requested information
- Support follow-up
- Permission-based promotional update

20.2 Good Message Structure

Business identity
Reason for message
Essential information
Clear action
Opt-out direction where required

Example:

ABC Institute: Your digital marketing counselling session is scheduled for 18 July at 3:00 p.m.

Reply YES to confirm or call us if you need to reschedule.

20.3 Avoid

- Messaging purchased phone databases
- Hiding the sender's identity
- Excessive reminders
- Sending at inappropriate times
- False urgency
- Continuing after an opt-out
- Adding people to groups without permission
- Automating confidential support conversations

Rules differ by country and platform. Always review the current official requirements before launching.

21. Social Media Scheduling Automation

Scheduling tools allow content to be prepared in advance and published at selected times.

21.1 Suitable Content to Schedule

- Educational posts
- Planned campaigns
- Product demonstrations
- Festival messages
- Event reminders
- Video promotions
- Blog distribution

21.2 Content That Requires Live Review

- News reactions
- Crisis communication
- Sensitive announcements
- Replies to complaints
- Trending content
- Time-sensitive inventory claims
- Weather- or event-dependent offers

21.3 Scheduling Workflow

1. Prepare the content calendar.
2. Obtain content approval.
3. Create the caption and creative.
4. Check the platform format.
5. Add links and tracking parameters.
6. Preview the post.
7. Select the correct account.
8. Schedule the date and time.
9. Review the schedule.
10. Monitor comments after publication.

Scheduling a post does not automate community management. A person must still monitor responses.

22. UTM Tracking for Automated Campaigns

UTM parameters help identify where website traffic originated.

Example:

https://example.com/course?
utm_source=brevo
&utm_medium=email
&utm_campaign=welcome_sequence
&utm_content=email_2_cta

22.1 Common UTM Fields

Parameter	Purpose	Example
utm_source	Traffic source	brevo
utm_medium	Marketing channel	email
utm_campaign	Campaign name	welcome_sequence
utm_content	Link or variation	email_2_button
utm_term	Keyword where relevant	seo_course

22.2 Naming Rules

Use lowercase and consistent separators:

welcome_sequence

Avoid inconsistent versions:

Welcome Sequence
welcome-sequence
WELCOMEsequence

22.3 UTM Spreadsheet

Create columns for:

- Destination page

- Source
- Medium
- Campaign
- Content
- Final URL
- Campaign owner
- Date created

Test every link before activating the automation.

---

23. Email Deliverability

Deliverability means the ability of an email to reach the recipient’s inbox.

23.1 Improve Deliverability

- Email only people who gave permission.
- Use a recognisable sender name.
- Authenticate the sending domain.
- Remove invalid addresses.
- Make unsubscribing easy.
- Avoid deceptive subject lines.
- Do not send sudden large volumes from a new domain.
- Monitor bounce and complaint rates.
- Send relevant content.
- Remove or re-engage inactive contacts carefully.

23.2 Hard Bounce vs Soft Bounce

Hard bounce: The address is permanently invalid.

Soft bounce: Delivery failed temporarily, possibly because the mailbox was full or the receiving system was unavailable.

Repeatedly sending to invalid addresses damages sender reputation.

23.3 Open-Rate Limitation

Open tracking is not completely reliable because some email applications protect user privacy or load images automatically.

Use a combination of:

- Clicks
- Replies
- Form completions
- Purchases
- Meetings
- Website conversions

---

24. Consent, Privacy and Responsible Automation

24.1 Consent Records

Where relevant, store:

- Consent status
- Date of consent
- Source of consent
- Form or wording used
- Channel permission
- Withdrawal date

24.2 Data Minimisation

Collect only the information required for a clear business purpose.

For a newsletter, the business may need an email address but not a date of birth, home address and identity document.

24.3 Access Control

Provide system access only to people who require it.

When an employee leaves:

- Remove access.
- Change shared passwords.
- Review connected applications.
- Transfer ownership of workflows.

- Check API or integration access.

24.4 Unsubscribes

When a contact unsubscribes:

- Stop promotional communication.
- Do not re-import the person into an active list.
- Preserve the suppression record where necessary.
- Check connected applications for conflicting status.

24.5 Legal Responsibility

Marketing, privacy and messaging laws differ by country. Students should learn the process but real businesses should obtain appropriate legal guidance.

---

25. Testing an Automation

Never activate an automation immediately after building it.

25.1 Create Test Contacts

Use test addresses controlled by the learner or organisation.

Test different situations:

- Complete contact information
- Missing first name
- Existing contact
- New contact
- Customer
- Non-customer
- Consent provided
- Consent missing

25.2 Testing Checklist

Trigger

- Does the correct event start the workflow?
- Can an existing contact enter?
- Can a contact enter more than once?

Conditions

- Does the correct branch run?
- Are AND and OR rules used properly?
- Is the audience filtered correctly?

Actions

- Is the right email sent?
- Are tags applied correctly?
- Is the CRM record created?
- Does the internal notification reach the team?

Delays

- Is the delay measured in minutes, hours or days?
- Is the time zone correct?
- Will messages be sent outside business hours?

Personalisation

- Does the name display correctly?
- Is fallback text configured?
- Are dates and currencies correct?

Links

- Do all buttons work?
- Do UTM parameters work?
- Is the destination page mobile friendly?

Exit

- Does a purchaser leave the sales sequence?
- Does an unsubscribe stop communication?
- Can a contact become trapped in the workflow?

25.3 Shorten Delays During Testing

A seven-day delay is not practical during testing. Duplicate the workflow and temporarily change:

7 days → 7 minutes

After testing, restore the correct delay before activation.

Brevo's own guidance recommends testing for issues such as unreplaced placeholders, contacts becoming stuck and incorrect exit behaviour before activation. [Brevo testing guidance]

---

26. Activating an Automation Safely

26.1 Pre-Launch Checklist

- Workflow objective is documented.
- Trigger is correct.
- Contact permission is available.
- Audience filters are correct.
- Email content is approved.
- Personalisation has fallback values.
- Links have been tested.
- Delays and time zones are correct.
- Purchase exit is configured.
- Unsubscribe handling is working.
- Sales owner has been informed.
- Test contacts completed every branch.
- Reporting method is ready.
- Workflow owner is assigned.

26.2 Start With a Small Group

If possible:

1. Activate the automation for internal testing.
2. Use a small permission-based audience.
3. Monitor delivery and errors.
4. Correct issues.
5. Expand gradually.

26.3 Maintain a Workflow Register

Workflow	Owner	Trigger	Audience	Status	Last tested	Next review
Welcome sequence	Riya	Joins lead list	New leads	Active	10 July	10 August
Review request	Aman	Order completed	Customers	Draft	—	—

27. Common Automation Problems

27.1 Contacts Do Not Enter

Possible causes:

- Wrong trigger
- Wrong list
- Contact existed before activation
- Filter excludes the contact
- Consent condition is not met
- Integration is disconnected
- Free-plan limit is reached

27.2 Duplicate Messages

Possible causes:

- Duplicate contacts
- Multiple workflows use the same trigger
- Re-entry is allowed
- The form was submitted more than once
- Two applications are performing the same action

27.3 Incorrect Personalisation

Possible causes:

- Field mapped incorrectly
- Contact field is empty
- No fallback text
- Different field names are used across systems

27.4 Purchaser Continues Receiving Sales Emails

Possible causes:

- Customer status is not updated.
- Purchase data is not connected.
- Exit condition is missing.
- Product identifiers do not match.
- Workflow checks the wrong field.

27.5 Automation Stops

Possible causes:

- Free task limit reached
- Email-send limit reached
- App connection expired
- Account password changed
- Sender verification failed
- Payment plan changed
- A required field is missing

27.6 Troubleshooting Process

Confirm the problem
↓
Identify one affected contact
↓
Check workflow history or logs
↓
Check the trigger
↓
Check conditions and field values
↓
Check action errors
↓
Correct one issue
↓
Retest with a new contact
↓
Document the solution

Do not repeatedly make random changes. Use the workflow log and test one stage at a time.

28. Measuring Automation Performance

28.1 Operational Metrics

- Contacts entering the workflow
- Contacts completing the workflow
- Error rate
- Processing time
- Failed actions
- Duplicate records
- Time saved
- Tasks completed automatically

28.2 Email Metrics

- Delivery rate
- Bounce rate
- Open rate
- Click-through rate
- Unsubscribe rate
- Spam complaint rate
- Reply rate

28.3 Sales Metrics

- Qualified leads
- Meetings booked
- Lead response time
- Lead-to-customer conversion
- Sales-cycle length
- Revenue generated
- Cost per qualified lead

28.4 E-Commerce Metrics

- Cart-recovery rate
- Repeat-purchase rate
- Average order value
- Review-submission rate
- Revenue per recipient
- Customer retention

28.5 Important Calculations

Click-Through Rate

$$\text{CTR} = \frac{\text{Unique Clicks}}{\text{Delivered Emails}} \times 100$$

Automation Conversion Rate

$$\text{Conversion Rate} = \frac{\text{Contacts Completing Desired Action}}{\text{Contacts Entering Workflow}} \times 100$$

Unsubscribe Rate

$$\text{Unsubscribe Rate} = \frac{\text{Unsubscribes}}{\text{Delivered Emails}} \times 100$$

Time Saved

$$\text{Time Saved} = \text{Manual Time per Task} \times \text{Tasks Automated}$$

Example:

Manual time per welcome email = 5 minutes
Automated welcome emails = 100

Time saved = 5 × 100 = 500 minutes

---

29. Improving an Existing Workflow

Do not add complexity without evidence.

29.1 Improvement Process

1. Define the workflow objective.
2. Review entry volume.
3. Identify where contacts stop.
4. Check message performance.

5. Review sales feedback.
6. Find one major weakness.
7. Change one variable.
8. Test the revised version.
9. Compare results.
10. Document the learning.

29.2 Possible Variables

- Subject line
- Message timing
- Number of emails
- CTA
- Form length
- Content type
- Offer
- Audience segment
- Landing page
- Follow-up channel

29.3 Avoid Over-Automation

Warning signs include:

- Too many messages
- Several workflows contacting the same person
- Conflicting offers
- Repeated reminders
- Customers receiving prospect content
- Employees ignoring automated alerts
- No clear owner
- Complex workflows that nobody understands

A simple, reliable workflow is better than a complicated workflow that cannot be maintained.

---

30. Using AI to Help Plan Automation

AI can assist learners with workflow planning, email drafts, test cases and documentation.

30.1 Workflow Planning Prompt

Act as a marketing automation planner.

Business:
Audience:
Customer action:
Desired business result:
Available tools:
Communication permission:
Messages available:
Human team involved:

Create a beginner-friendly workflow containing:
1. Trigger
2. Entry conditions
3. Actions
4. Delays
5. Decision branches
6. Exit conditions
7. Human responsibilities
8. Metrics
9. Test cases
10. Possible risks

Do not assume that an integration exists.
Do not write technical code.

30.2 Testing Prompt

Review this marketing automation workflow.

Identify:
- Missing exit conditions
- Duplicate-message risks
- Consent problems
- Incorrect timing
- Missing fallback values
- Possible integration failures
- Cases requiring human review

Create ten test scenarios in a table.

[Paste workflow]

30.3 Important Rule

AI may recommend features that are unavailable on the learner's tool or plan. Verify every suggested trigger, action and integration inside the actual platform.

---

31. Practical Activities

Activity 1: Automation Opportunity Audit

Select a business and list ten recurring marketing activities.

Classify each as:

- Automate now
- Partially automate
- Keep manual

Explain the reason.

Activity 2: Lead Form and Spreadsheet

Create:

- One Google Form
- One linked Google Sheet
- Standard lead statuses
- Consent field
- Follow-up columns
- Five test submissions

Activity 3: Welcome Automation

Build a workflow containing:

- List-entry trigger
- Welcome email
- Two-day delay
- Educational email
- Purchase exit
- Unsubscribe handling

Activity 4: CRM Pipeline

Create a pipeline for:

- E-commerce
- Service business
- Local store

- Educational institute

Choose one and define the actions that should occur at every stage.

Activity 5: No-Code Connection

Create a two-step connection in an available no-code tool.

Document:

- Trigger application
- Trigger event
- Action application
- Action event
- Fields mapped
- Test result
- Monthly task requirement

Activity 6: Workflow Testing

Test at least five contact situations:

- New subscriber
- Existing subscriber
- Missing name
- Existing customer
- Unsubscribed contact

Record the result of each test.

---

32. Module Project: Complete Marketing Automation System

Project Objective

Design and demonstrate a practical automation system for one business.

Choose:

- E-commerce website
- Service-based website
- Local store
- Educational institute
- Event business
- Personal brand

Project Deliverables

Part 1: Business Process

- Business description
- Target audience
- Automation objective
- Current manual process
- Problems in the manual process

Part 2: Data Collection

- Lead form
- Consent field
- Contact database
- Field definitions
- Tag naming system
- List structure

Part 3: Workflow

- Trigger
- Conditions
- Actions
- Delays
- Decision branches
- Exit conditions
- Human responsibilities

Part 4: Communication

- Welcome email
- Two nurturing emails
- One internal notification
- One follow-up reminder
- Unsubscribe process

Part 5: Testing

- Test-contact details
- Test cases
- Expected result
- Actual result
- Errors found
- Corrections made

Part 6: Measurement

- Primary KPI
- Supporting metrics
- Reporting frequency
- Time saved
- Expected business benefit

Part 7: Documentation

- Workflow diagram
- Tool accounts used
- Free-plan limitations
- Login ownership
- Review schedule
- Troubleshooting notes

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33. Key Terms

Term	Meaning
Marketing Automation	Software-based execution of predefined marketing activities.
Trigger	An event that begins a workflow.
Action	A task performed by the automation.
Condition	A rule used to decide what happens next.
Delay	A waiting period between workflow steps.
Workflow	A complete series of automated steps.
Contact	A person stored in the marketing database.
List	A collection of contacts.
Tag	A label applied to a contact.
Segment	A group of contacts selected using conditions.
CRM	A system for managing leads, customers, deals and interactions.
Lead Nurturing	Providing useful communication to develop a prospect over time.
Lead Scoring	Assigning points to help prioritise leads.
Field Mapping	Matching information fields between applications.
Integration	A connection that allows applications to exchange information.
Webhook	A method of sending information when an event occurs.
API	A controlled method through which software applications communicate.
Transactional Message	A message required for a transaction or account activity.
Promotional Message	A message intended to encourage a purchase or marketing action.
Bounce	An email-delivery failure.
Exit Condition	A rule that removes a contact from a workflow.

34. Final Practical Checklist

Before building:

- Define one clear objective.
- Draw the manual process.
- Identify the trigger.
- Confirm customer permission.
- Prepare clean contact fields.
- Select the simplest suitable tool.
- Check free-plan limitations.

While building:

- Use clear workflow names.
- Add only necessary steps.
- Configure delays carefully.
- Add fallback personalisation.
- Add purchase and unsubscribe exits.
- Assign human responsibility.
- Add tracking links where appropriate.

Before activation:

- Test every branch.
- Check mobile email appearance.
- Verify every link.
- Test missing information.
- Check duplicate-entry behaviour.
- Confirm the correct time zone.
- Inform the sales or service team.
- Save workflow documentation.

After activation:

- Monitor the first contacts.
- Check errors daily during launch.
- Review task and sending limits.
- Check unsubscribes and complaints.
- Compare automation results with the objective.
- Update outdated messages.
- Review access and integrations regularly.

Final Learning Outcome

After completing Module 9, students should be able to design and operate practical marketing automation workflows without a technical background.

They should be able to collect permission-based leads, organise customer information, create welcome and nurturing sequences, connect applications using no-code tools, automate sales reminders, support e-commerce and local-business communication, test workflows and measure results.

The purpose of marketing automation is not to remove human interaction. Its purpose is to handle predictable, repetitive work so that marketers and salespeople can spend more time understanding customers, solving problems and building valuable relationships.

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